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ABSTRACT

These principles are intended for application by employers of large or small organizations who wish to improve the efficiency of clerical workers. They include policies and practices that respond to social and technological changes and implement a systematic approach to training. Seven principles highlight the value of training clerical workers. Discussion follows of three basic policies and practices that may be used to improve clerical training and the effectiveness of clerical workers. They include responding to technological change, taking account of social change, and implementing the systems approach to training. A model is presented in 11 steps: consider organizational objectives and policies, set training objectives and policies, name the position, prepare job descriptions, prepare a job specification, establish performance levels for training, decide who will do the training and train the trainers, recruit the person most suited to the job, plan the training, implement the training program, and assess the effectiveness of the training. Appendixes include sample job specifications, a training checklist for identification of training needs, a sample training program, and a sample training record. (YLB)

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Guidelines for Employers

on the training and development of clerical workers

Vocational Training Council

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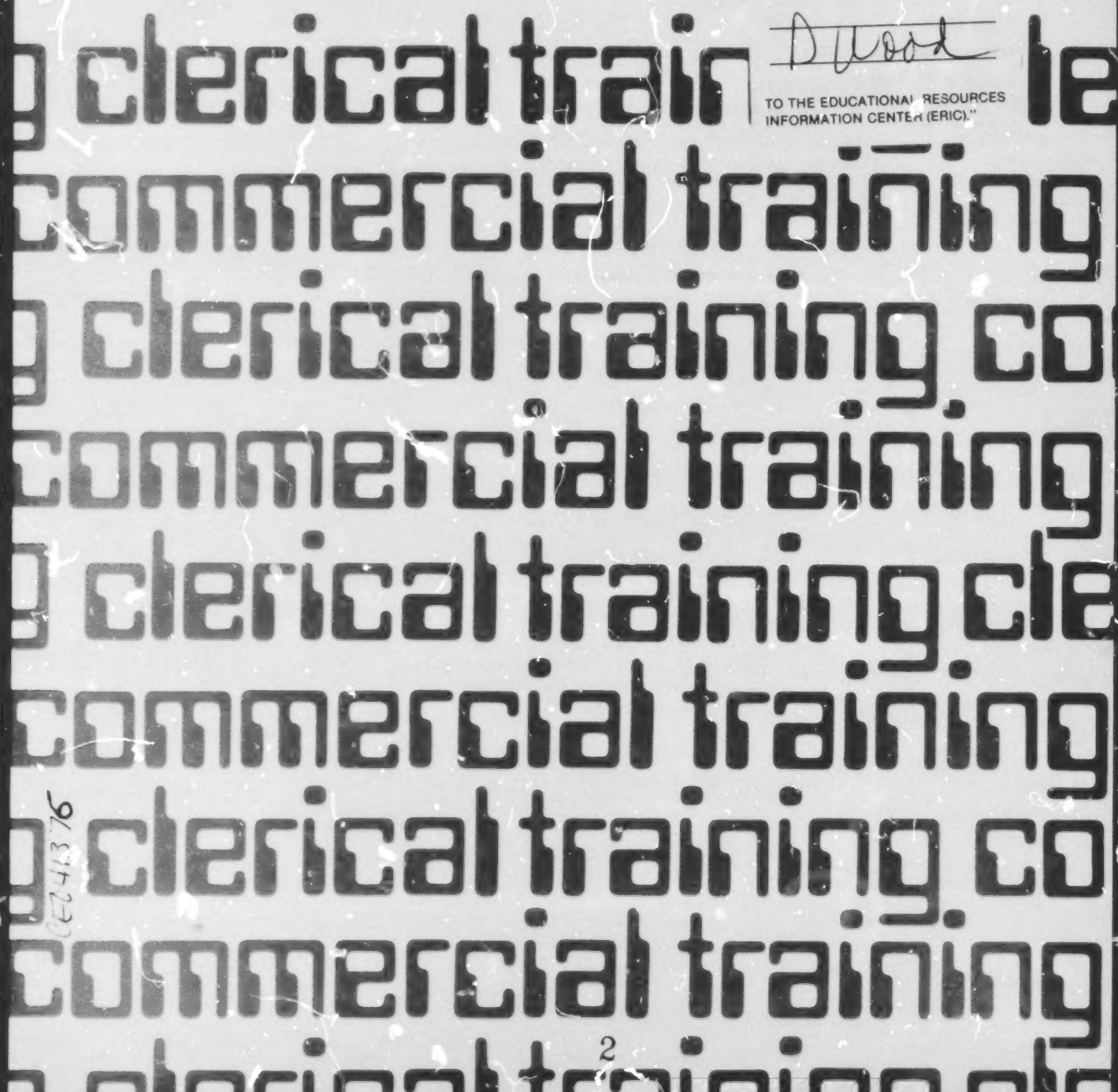

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INTRODUCTION

These Guidelines for Employers have been prepared as a result of research undertaken jointly by the Vocational Training Council and the New Zealand Council for Educational Research. A working party, representative of the Department of Education, employers and employees monitored the research and developed the guidelines.

The research pointed up a number of factors which can influence the effectiveness of clerks and the overall efficiency of organisations. The most significant factors were the degree to which the organisation had introduced planned or systematic training and the attitude of the clerks. The latter was often affected by the way the clerks were trained, the opportunities they saw for training and development and the overall communications within the organisations, especially with regard to change.

An employer of a large or small organisation who wishes to improve the efficiency of clerical workers should benefit from applying the principles suggested in these guidelines. The principles are simple and have been used with success by employers both in New Zealand and overseas. They are: use policies and practices which respond to social and technological changes and implement a systematic approach to training. The human resources in any organisation are costly. Clerical workers, as much as professional, managerial or technical staff will respond to well planned training and development.

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A copy of the research report mentioned above is available from the offices of the Vocational Training Council.

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WHY TRAIN CLERICAL WORKERS?

Clerical staff are an important human resource in any organisation, large or small. The following principles highlight the value of training clerical workers.

* clerical staff are an expensive resource both to train and to retain
* people who are not properly trained make mistakes which take time and money to correct
* office jobs are continually changing in response to developing technology: new skills are needed
* many clerical jobs require a high degree of accuracy and some may involve substantial responsibility
* clerical staff are often the major point of contact with the customers or suppliers
* people have a right to work which encourages personal and vocational development
* people who are learning and developing skills are usually well motivated and enthusiastic

HOW CAN CLERICAL TRAINING BE IMPROVED?

There are three basic policies and practices which may be used to improve clerical training and the effectiveness of clerical workers. These are:

- Responding to technological change
- Taking account of social change
- Implementing systematic training

Responding to technological change

Technological advances are continually changing the skills and knowledge needed by clerical workers. Some jobs will disappear altogether (such as book keeping) while some new jobs will appear (such as word processor operators). Research shows that there will be a trend towards some jobs becoming less demanding, while other jobs will require the clerk to have higher skills. It will no longer be possible for a person to train once for a particular aspect of clerical work and expect to be able to continue to use those skills for the rest of his or her working life.

For a manager who is interested in fully developing the human resources of the organisation, these changes may call for some measures which may diminish the effect of continual technological change. The following measures are suggested:

- Train staff so that they understand how the information systems work and how to use them. This will involve giving the staff some basic skills in logic, keyboard skills and some information about the limits to the existing programme and possibilities for future applications of the technology.
- Encourage staff to develop a wide range of useful, transferable skills and help people become aware of the need for flexibility and adaptability at work. This might be done by planned job rotation and by raising the subject during appraisal discussions.
- Be aware of how technological changes will influence particular jobs and give clerks an early warning of the need to retrain. In planning new clerical jobs, take care that the new positions are those which allow for people to use their capabilities.
- Involve clerks in designing their own computer based work systems. This should have the dual effect of creating systems that provide a high level of job satisfaction yet which are at the same time administratively and technically efficient.
- Help reduce some of the depersonalisation that may accompany technological change by (if the organisational climate permits) training staff so that they can take more responsibility for their own work. It may be possible to give staff much more autonomy over their work, to create work teams with transferable skills, to allow them to make more decisions or to work on a longer task cycle. The introduction of these changes should be done in consultation with the clerks so that the needs and expectations of individuals and groups can be taken into account. Training in the necessary skills, such as team building and group decision making will also need to accompany such changes.

Taking Account of Social Change

The composition of the clerical workforce and the changes that are taking place now and those that are anticipated in the near future may require special consideration if an employer wants to make full use of

the human resources of the organisation.

There are four main changes to consider:

- the large and increasing numbers of women in the clerical sector
- the numbers of part-time clerical workers in employment
- the increasing numbers of young Maori and Pacific Island people who will enter the employment market in the next six to ten years
- the growing recognition by the community that employers have a responsibility to workers who are handicapped

The first of these changes, the increasing numbers of women in the clerical sector, has been in process for a number of years. Today sixty-six per cent of clerical workers are women and clerical work is particularly important for women who are returning to work after being out of the paid workforce while children are still young. Many New Zealand women do return to work after a decreasing time out of the workforce and many expect to be able to fully develop their capabilities. Yet some employers still make assumptions about women's commitment to the job, the length of their working life and the types of employment to which they are best 'suited'. These assumptions are often based on a stereotypic view of women, and they are being increasingly challenged by women both from a sense of justice and from real economic need.

It has been found that an organisation where the stereotypic view of women persists, management is likely to find that women are disillusioned, lacking motivation and will most likely be working well below potential. Even if managers privately support equal opportunity a clear statement in the training policy about equal opportunity and positive encouragement to women clerks, including secretarial staff, to share equally in the training and development opportunities may improve the utilisation of the organisation's human resources. If lack of confidence is a problem, assertiveness training may be useful. Where a woman has recently been trained and promoted to a traditionally male position she may need special management support so that she retains confidence and develops the skills needed for her new position.

Part-time staff are also a valuable human resource and part-time staff may contribute more to the organisation if they are given training and development opportunities. Many women today are using part-time work as a bridge back into full employment and employers might usefully train these women in preparation for full-time work. Those people for whom part-time work is the only employment available (and increasingly this may be the case) are likely to be better motivated and more committed to their work if they are given training and development opportunities which encourage personal and career development.

The changes in the Maori and Pacific Island workforce will be felt most acutely in about six to ten years. At present about fifty-eight per cent of the Maori (and a similar proportion of the Pacific Island) population is under the age of twenty with the largest group being about the age of nine years. This compares with thirty-nine per cent of the non-Maori population which is under the age of twenty. In the near future, therefore, increasing numbers of Maori and Pacific Island people will be available for employment. Traditionally few of these people have found work as clerks, although some large organisations have successfully attracted a disproportionately high number of Maori and Pacific Island people into clerical jobs. Assumptions about Maori and Pacific Island people's ability or desire to take on clerical work are generally as ill founded as those about women and there may be a need for management to check their recruitment policies and to find positive ways of helping Maori and Pacific Island people enjoy the full benefit of training and development. It may be useful for example if a person is unable to afford full-time technical institute study for secretarial training, if the employer could provide the clerk with an opportunity for day release training in keyboard skills.

An employer may also benefit by adopting policies and practices which enable disabled people to work to their full potential. Possible measures include training for part time work, special physical access arrangements or work schedules which are mutually convenient to the employer and employee. A Government subsidy, called a modification grant, is available for employers who take on staff through the Department of Labour. This Department also administers a reducible training subsidy which is available for up to three years. More information about these schemes can be obtained through the Labour Department's Special Duties Employment Officers. The Accident Compensation Corporation may also be able to assist employers of persons who have been disabled through accident. Each case is taken on its merits but officers in the Rehabilitation Service of the ACC offices (located in many centres throughout the country) will be able to give specific advice. Finally, the Rehabilitation League, which is also located in centres throughout New Zealand, can provide advice about assessment, work place adaptation and training.

Implementing Systematic Training

The systems approach to training is an effective, practical method of identifying training needs in a way which should ensure that training is relevant and the *performance* of staff will be improved. Here is a model of systematic training which is presented in eleven steps.

STEP ONE:

Consider the organisation's objectives and policies

Clerical tasks are essentially information handling processes with specific organisational objectives. The clerk's work contributes to the flow of information both within the organisation and between the organisation and its environment. An organisation must know its objectives before deciding what training needs to be done. Training can be wasteful if it is not related to the organisation's specific needs.

STEP TWO:

Set training objectives and policies

If training is to be effective it will be important that the organisation accepts a definite training policy and that the responsibility for training is accepted by senior management. A senior manager or the manager of a small business should assume overall responsibility for the implementation of the training policy and should ensure that:

- the training needs are identified
- suitable standards are determined for the selection of staff
- an appropriate training programme is developed
- the instructors are competent and the training is given to the required standard
- the effectiveness of the training is assessed by both the supervisor and the employee
- records of the trainees progress are maintained.

The inclusion in the training policy of a clear statement on the organisation's views on rights of all individuals (regardless of sex, age or race) to benefit from the training and development programme in that organisation would show that management is concerned to develop the full human resource.

STEP THREE:

Name the position

Name all the clerical positions, including secretaries, typists, data processor operators etc., and draw up an organisation chart showing people's authority and responsibilities and how reporting and communication patterns are to work.

STEP FOUR:

Prepare job descriptions

A job description is simply a broad statement of the scope, duties and responsibilities of a particular job holder. It is essentially a statement of the key tasks a clerk performs and it helps to place the job in perspective alongside other jobs performed in the same department or organisation. A suggested job description for a Ledger Clerk is given in Appendix 1.

STEP FIVE:

Prepare a job specification

The next step is to examine the job with the clerk concerned in order to identify that job's component parts and the way in which they are performed.

A. One step towards this analysis of the job is to consider the flow of work in an office. Check out the following:

(i) *What work is received by the clerk?*
What documents must the clerk recognise and interpret?
What are the symbols that must be understood and used?
What technical expressions and abbreviations are used?
What are the sources and functions of documents?
How can defective items be identified?

(ii) *What actions must the clerk initiate on receipt of the inputs?*
What calculations must the clerk perform?
What checks should the clerk carry out?
What information does the clerk transfer?
What filing systems does the clerk use?
What equipment does the clerk use?
How does each clerical task contribute to the achievement of the organisation's objectives?
Why does a task have to be performed in a particular way?
In what ways may the task influence and/or be influenced by other activities within the organisation?

(iii) *What work is passed on?*
How is the information transmitted (standard documents, letters etc.)?
What symbols does the clerk use?
What are the channels of communication?
What consequences and costs could flow from incorrect or incomplete performance of the task?
Can an error have a chain reaction effect in the organisation?

B. Next, go through each task performed by the clerk and find out what a person *has to be able to do* to carry out each task. Be as specific as you can, describing the skill not the task, and noting the equipment used. For example a common basic skill needed by clerks might be to work out percentages using a calculator.
It will also be necessary to find out what a person needs to know in order to carry out each task. A sales clerk, for example, may need to know the range of products, their special features, stock levels etc. In general a clerk will need to have more skills than knowledge, so express as much as you can in terms of skills.
Enter the skills and knowledge on a job specification (see Appendix 2).

STEP SIX:

Establish Performance Levels For Training

It is important that both the supervisor and the job holder appreciate the need for, and agree to the setting of standards of performance against each main task listed in the job specification. Unless it is clear how well a person must do each task, it will not be possible to train to a standard which will produce the desired results. If the job holder is unable to meet the employer's need for certain standards, then it may be necessary to refine systems or improve training.

Performance standards must be specific and measurable and they are usually expressed in terms of quantity and quality. For example a counter clerk in a service organisation might have to be able to answer correctly and appropriately 80% of all customer enquiries without referring to the supervisor; or a general accounts clerk might need to be able to complete all orders within 48 hours of receipt of instructions to a defined standard of accuracy demanded by the supplier.

Enter the performance standards on a training check list. See Appendix 3.

STEP SEVEN:

Decide who will do the training and train the trainers

Instructing people how to do a job is a skill which can be learned. Poor instruction often results in errors, misinformation, frustration and low motivation. Those who are teaching new staff members must be aware of how adults learn, especially of the importance of immediate unambiguous feedback.

The Vocational Training Council is arranging for a nationally available instructor training course. At present instructor training is available through some institutes and some industry training boards only. See Appendix 4 for the Principles and Differences in adult learning.

STEP EIGHT:

Recruit the person most suited to the job

The starting point for the selection of new clerical workers is the job specifications, that is matching up what the organisation needs and what a particular individual can do.

In these days of high levels of unemployment it may be tempting to recruit people with high academic qualifications for jobs which do not require passes in national examinations. Be clear about what the organisation really does need, remembering that the employer has a responsibility to train staff. Check the recruitment policy and practice for discriminatory biases

STEP NINE:

Plan the training

New entrants to clerical posts will need induction and basic training. Some of the basic training might be suited to an off-job course, while all clerical jobs will need planned on-job training. Consider the training under the following headings:

Induction

Each new entrant will need to be properly introduced to the place of work so that he or she understands the conditions and purpose of the job, the relationship with fellow workers, the kind of activity in which the organisation is involved and the opportunities available for training and career development. Induction should not be regarded as a single period at the start of a training programme. Several of the matters with which induction is concerned are better dealt with at a later stage when the trainee has gained some more knowledge. The induction training period will vary depending on the size or the organisa-

tion, and the complexity of the job. (See Appendix 5 for an example of an induction programme.)

On-job Training

All clerks will need some planned on-the-job training. Using the analysis from Step Two, decide how the processes can best be taught. A great deal of clerical work requires diagnostic skills, i.e. deciding what to do out of a predetermined set of alternatives. A learner may be helped by having a desk file, check lists, algorithms, manuals, specimen documents, lists of information sources etc. Prepare the relevant instructional aids in consultation with existing staff. (See Appendix 6 for an example of items contained in a desk file.)

Off-job Training

If a course is an appropriate part of the training, find out whether there are any courses available at institutes, through the New Zealand Institute of Management, or the Export Institute, Transport Institute etc., (See Appendix 7) which will meet your objectives. Get details of the course content, teaching methods and level at which the course is aimed. It may be necessary to send someone on a course to evaluate the usefulness of that particular programme for your organisation.

If there are no courses available and if you have the resources to run a course of your own, set down the objectives for the instruction in *performance* terms (that is what a person will be able to do at the end of each session) and plan the course. Because each learner will probably have slightly different needs or expectations, leave enough flexibility in your planning to allow for the student's involvement in shaping the final programme.

STEP TEN:

Implementation of the training programme

Generally basic induction, for example information about the organisation, wages, leave allowances etc., is best carried out away from the employee's desk. On-job training should begin as soon as possible, placing the new entrant under the supervision of a trained trainer who is aware of specific learning objectives. It is not enough to simply show people how to do a task once and then expect them to ask questions. People will only learn by experience if they have immediate and unambiguous feedback on how well they have done and if necessary, why they are wrong, at the end of each trial.

Off-job training should be preceded by a discussion with the clerk about what he or she needs to learn on the course and how the skills and knowledge gained will improve performance on the job.

Immediately after the course, the manager or supervisor should have a further discussion with the clerk to find out:

- What has been learned and how the learning can be applied on the job.
- What follow-up, if any, is needed.
- Whether other staff members would benefit from doing the course or whether there should be a staff meeting to discuss the outcome of the course (this might be important if change is likely as a result of the course);
- Whether an action plan for improved performance on the job should be prepared and if so what schedule should be set up to review the action plan.

Keep records of all the training induction, on-job and off-job. (See Appendix 8 for an example of a training record.)

STEP ELEVEN:

Assess the effectiveness of the training

Assessing the effectiveness of training can be done in a number of ways:

- **Daily performance feedback**

  People need constant and specific feedback both on how well they are doing and on any short comings. Daily performance feedback might take the form of a regular ten minutes each day, or could be a more informal exchange of views on how the clerk is managing with the work.

- **Regular structured discussions**

  In addition to providing employees with day-to-day feedback about their performance, supervisors also need to evaluate the clerk's overall performance periodically and make plans for the future.

  While day-to-day feedback generally zeroes in on specific areas of performance the regular structured discussion is an opportunity to look at overall performance as it relates to the entire job. For a performance appraisal to be effective the supervisor must be well trained in inter-personal skills and should be able to use a planned approach to the discussion. One very effective method involves arranging a regular (and uninterrupted) time with the clerk during which the clerk first assesses his or her own weakness in performance. The supervisor listens to this without interruption and then gives his or her own assessment of the clerk's weakness. The clerk and the supervisor then repeat this process, this time identifying the specific strengths in performance. Finally the clerk and the supervisor have a joint discussion on future training and development needed to improve performance. At the end of the session the clerk and the supervisor should have made a clear contract as to what training needs to be done, how it should be done and when the training will be done. All details should be set down on the training check list.

- **Post-course follow-up**

  At an appropriate time after a course (perhaps 3-6 months) arrange a discussion with the clerk to find out if the course has been useful, that is whether or not there has been improved performance on the job. Note the positive features of the course and how future courses could be improved.

- **Annual Appraisal**

  If the clerk has had a regular discussion about performance on-the-job, the yearly appraisal can be used as a chance to have a very general discussion about performance and to also discuss the clerk's aspirations and future personal and career development. Once again features of the appraisal might include self-assessment and goal setting. If a marking system is to be used, avoid using a normal curve of distribution, which tends to detract from the clerk's perception of the value of the appraisal. A good appraisal should be of benefit to both the organisation and the individual.

If your organisation needs any further help in implementing a systematic approach to the training and development of clerical staff please contact the appropriate industry training board or small business agency. Locations and telephone numbers are given in Appendix 9.

A SAMPLE
JOB DESCRIPTION/LEDGER CLERK — APPENDIX 1

Job title: Ledger Clerk
Branch: Waipawa
Date prepared: January 25 1981
Responsible to: Accountant
Relationships: To work as a member of a team of eight people working at the branch
Function: To attend to customer ledger enquiries
Duties:

1. Attending to customer telephone and counter enquiries, including duplicating statement and attending to searches
2. All functions involved with the processing of Cheque and Savings accounts Opened and Closed including those transferred to and from other Branches
3. Recording, loading, and filing all Ledger Authorities
4. Actioning Ledger Department correspondence
5. Fully checking all Vouchers of $200 and over for irregularities
6. Actioning Master file changes and deletion and filing relative printouts
7. Drafting Ledger Department returns
8. Research on account of the Refer List including extracting cheques, master files etc.
9. Perusing Death Notices daily, the correspondence clip, circulars and diary notes and actioning as necessary
10. Preparing Certificates of Balance
11. Actioning Daily Diary
12. Preparing sundry entries, bank cheques and vouchers

A SAMPLE
JOB SPECIFICATION/GENERAL ACCOUNTS CLERK — APPENDIX 2

TASKS	SKILLS AND ABILITY TO	KNOWLEDGE
1. Payment of invoice/claims	check information is complete and correct	Treasury Regulations office systems for payment purpose of forms supplied
	Transfer information	
	Use cross reference filing system	book-keeping systems
	write cheques	
	maintain accounts books	
	use a calculator	
	communicate verbally to give and acquire information	
	work as a member of a small team	
2. Reimbursement of imprest account	interpret codes, match codes and payments	coding system
	add	
	list	
	transfer information	
	check	
	work in percentages	

A SAMPLE JOB SPECIFICATION/GENERAL ACCOUNTS CLERK (CONT.)

APPENDIX 2

TASKS	SKILLS AND ABILITY TO	KNOWLEDGE
3. Balance cash book	read bank statements	book-keeping
	cross check	understand factors that effect balance
	calculate adjustments (multiply and add)	
	use book-keeping systems	
4. Reconcile monthly expenditure report	add	monthly repeating procedures and deadlines
	balance	
	scan information for mistakes	
	transfer information	
	summarise	
5. Calculate and pay grants	select appropriate information from files	filing system
	calculate money to a formula (add and divide)	grants schedules
	if appropriate write cheques	payment procedures
	write letters	
	respond to telephone inquiries	
6. Check and pay claims for refund of expenses	check information is complete and correct	Reimbursement regulations and rates
	communicate verbally to clarify information	
	cope with conflict	
	read tables	
	calculate (multiply money)	
	transfer information	
	write cheques	
	check on changes to rates	
7. Calculate and pay wages of tea lady	read pay tables	pay rate
	calculate wages (multiply hours by dollars)	PAYE system
	read tax tables	
	subtract tax	
	transfer information	
	write cheques	

A SAMPLE JOB SPECIFICATION/GENERAL ACCOUNTS CLERK (CONT.)

APPENDIX 2

TASKS	SKILLS AND ABILITY TO	KNOWLEDGE
8. Calculate and pay PAYE withhold tax to Inland Revenue Department	cross checking summarise complete IRD form	PAYE system
9. Yearly reconciliation of PAYE and withholding tax	add (using adding machine) balance complete IRD form	PAYE system
10. Main debtors ledgers	maintain alphabetical debtors ledger balance write letters	office debt procedures
11. Maintain petty cash box refunding when required	maintain record of payments add count cash balance, check write cheques	

A SAMPLE
JOB SPECIFICATION/CORRESPONDENCE CLERK

APPENDIX 2

TASKS	SKILLS AND ABILITY TO	KNOWLEDGE
1. Correspondence; answer from regional office representatives and public for advance account balances; history of advance accounts and general accounting enquiries	read and understand use keyboard retrieve information using VDU and microfishe follow logical processes to search for information interpret information; i.e. reconstruct action from given data selact action from a limited number of possibilities calculate adjustments (using a formula x and %) Read computer instruction manuals key in adjustments to VDU use telephone dictation system give spoken instructions clearly dictate simple business letters rephrase technical concepts in simple language	information available on computer different types of policies coding system company accounting system different types of accounts current interest rates policy payments cycle interest billing cycle
2. Telephone and counter enquiries	listen and understand, frame questions to find out relevant information speak with people in an effective appropriate manner handle customer complaints, retrieve information and take action as above	as above
3. Process and check mode alterations	code information punch input into VDU transfer information select correct account check information is correct	procedures for mode alterations reasonf for procedures
4. Check VDU input of Clause 6	cross check VDU against input sheet	procedures for lapsed policies

IDENTIFICATION OF TRAINING NEEDS THROUGH PERFORMANCE APPRAISAL: TRAINING CHECKLIST

APPENDIX 3

STARTING DATE 6/3/80

POSITION: Correspondence Clerk
NAME: Anthony Bell
REPORTS TO: Karen Patterson
TRAINING SUPERVISED BY: Karen Patterson
Mark off (✓) in trained column when standard reached.

MAIN TASKS	STANDARDS OF PERFORMANCE	TRAINED	TRAINING NEEDED	DATE COMPLETED TARGET	DATE COMPLETED ACTUAL
1. Correspondence: Answer from regional office representatives and public for advance account balance; history of advance accounts and general accounting enquiries	Answer 95% of enquiries without referring to supervisor		Too many referals to supervisor Needs training in dictation	9.6.82	
2. Telephone	Answers 95% of enquiries and without referring to the Supervisor. There should be no criticism of the officer from the public		Too many referals	9.6.82	
3. Process and check mode alterations and DDB	Process a minimum of 16 alterations a day; 100% accuracy	✓			
4. Check VDU input of Clause 6	60 per month 100% accurate	✓			

NOTE: This checklist should be kept on the staff member's personal file.

ADULT LEARNING: PRINCIPLES AND DIFFERENCES APPENDIX 4

There are important principles of learning that all trainers should bear in mind when planning on-the job and off-the job education and training courses for adults. These are:

1. The learner must be motivated to learn.
2. The learning situation should take account of individual differences in the speed of learning, depth of learning and amount learned and the sequences in which responses are learned.
3. What is learned should not conflict with present views or attitudes — these should be unlearned first. New learning should be built on the learners' present knowledge and attitudes.
4. What is learned should be reinforced.
5. The learning situation should give opportunities for practice and allow for consolidation.
6. The learner should be an active participant trying out new responses rather than just listening.
7. The material to be learned should be divided into learnable units and given in an appropriately paced sequence.
8. Coaching or guidance should be given in the development of new responses.
9. What is learned should be capable of being successfully generalised from the training situation to the work situation and of being appropriately used.
10. What has been learned should be integrated into other activities and other learning.
11. The material to be learned should be presented in a way that will emphasize the characteristics to be learned and do so in a way which is as meaningful as possible to the learner.

Teaching adults is different from teaching children. One way of explaining these differences is to look at the results of our knowledge to date in a side-by-side comparison as follows:

ADULTS	CHILDREN
1. Tendency towards self-directedness and independence — resentment at non-recognition of this.	1. Dependency on others.
2. Importance of individual experience. The person is the result of his or her experience. Learning methods should tap learners' experience.	2. Children identify themselves by external definers — parents, teachers, etc. — experience is something that happens to them.
3. Readiness to learn is based on 'need' due to roles as workers, spouses, parents, enthusiasts, etc.	3. Readiness to learn based on biological and academic development.
4. Orientation to learning is problem centred with immediate application.	4. Subject centred orientation to learning with postponed application.

Reference: Knowles, M. "The Adult Learner: A Neglected Species." 2nd Edition. Gulf Huston 1978.

A SAMPLE INDUCTION TRAINING PROGRAMME

APPENDIX 5

NAME: .....

POSITION: .....

RESPONSIBLE TO: .....

LOCATION: .....

The following points have been discussed with this new appointee/transferee who commenced duty on ..../..../.....

NOTE: Because there is so much for new employees to remember during the first week at work, this introductory process should be spread over two to three weeks.

	EXPLAINED BY (PLEASE INITIAL) NEW APPOINTEE	TRANSFEREE
A. CONDITIONS OF WORK		
1. Hours of duty (flexible working hours if applicable), and lunch and tea breaks	.....	.....
2. Holidays	.....	.....
3. Sickness	.....	.....
4. Salary scales and awards calculation and methods of payment ..	.....	.....
5. Contract of employment, including period of notice	.....	.....
6. Relevant legislation (if appropriate)	.....	.....
7. Trade union, membership, delegate, grievance procedures ..	.....	.....
B. SAFETY		
8. Fire and earthquake precautions; drill, alarms, equipment, escapes and exits, floor warden	.....	.....
9. Accident prevention and occupational hazards (electricity etc.) ..	.....	.....
10. First aid and location of facilities	.....	.....
11. Accident procedure	.....	.....
C. GENERAL WELFARE		
12. Superannuation scheme	.....	.....
13. Canteen facilities (if any)	.....	.....
14. Social club (if any)	.....	.....
D. THE ORGANISATION AND THE TRAINEES ROLE WITHIN IT		
15. The organisation, its products and achievements; the Organisation structure, groups, divisions etc.	.....	.....
16. The importance of the trainee's job; where it fits into the organisation what he/his contribution means to the whole	.....	.....
E. INTRODUCTION TO THE DEPARTMENT/BRANCH		
17. Geography of offices and works — tour	.....	.....
18. Location of cloakroom, canteen and other facilities	.....	.....
F. AN INTRODUCTION TO THE JOB		
19. Introduction to the supervisor	.....	.....
20. Introduction to other staff	.....	.....
21. Introduction to the trade union delegate	.....	.....
G. EDUCATION TRAINING AND DEVELOPMENT		
22. The method of training/training policy of the organisation	.....	.....
23. Training programmes available within the organisation	.....	.....
24. Training programmes and courses of study appropriate to the job available at outside agencies	.....	.....
25. Career possibilities and promotion policy	.....	.....

Signed: .....
(employee)

.....
(controlling officer)

ITEMS IN ONE RECEPTION/TYPIST'S DESK FILE — APPENDIX 6

1. Job Description.
2. List of the names, designation and function/responsibilities of each staff member.
3. List of the names and addresses of the main groups of people associated with the organisation.
4. Instruction on how to use the switchboard.
5. Glossary of terms associated with the industry.
6. Explanation of duties relating to toll calls and telegrams.
7. Typing instructions viz:
   standard format of major types of documents (examples included)
   numbers, colour and function of copies
   identification systems (codes, file numbers)

EDUCATION COURSES FOR CLERICAL WORKERS — APPENDIX 7

	Course and Provider	Duration	Entry Requirements
1.	Secretarial studies available at most institutes	1 year full time or several years part time	general education and usually 6th form certificate
2.	New Zealand Certificate in Commerce (NZCC): For accounts clerks. Available at most technical institutes	Stages I and II can be done full time, the remainder must be done while in employment: 3-5 years study	generally 6th form certificate cross credits for some school subjects available for Stages I and II
3.	New Zealand Society of Accountants (ACA): Available at most technical institutes including TCI. Cross credits are available if students take the appropriate subjects in a University Degree	3 years full time or can be done part time	University Entrance or New Zealand Certificate in Commerce with specified grades
4.	New Zealand Institute of Management Supervision Certificate (NZIM: for supervisors). Available at most technical institutes	2 years part time	nil; course designed for people in employment
5.	Institute of Chartered Secretaries and Administrators: for Administrators. Available at several technical institutes including TCI	3-5 years part time	University Entrance, or be over 21 years
6.	New Zealand Law Society Legal Executives Certificate: Available for legal executives at several technical institutes	2 years part time	3-4 years secondary education or experience
7.	Certificate in Export Administration (1st stage of Diploma of Export). For export Administration and Marketing staff. Available at three institutes only (ATI, WP and TCI)	2 years part time	UE or best 6th form Certificate subjects not exceeding 16 marks or three years business experience
8.	Diploma of Export: for marketing managers. Available at some technical institutes including TCI	2-3 years part time	As for Certificate in Export Administration
9.	Bankers Institute of New Zealand Associateship; for bank employees. Available at some technical institutes including TCI.	3-5 years part time	pass a preliminary exam through the TCI, (course being revised) or have University Entrance, or be over 23 years, or at Grade III Level
10.	Insurance Institute Associateship; for insurance clerks. Available several technical institutes including TCI	3-5 years part time	relevant work experience
11.	Chartered Institute of Transport in New Zealand for clerks working in transport organisations at TCI only	4 years part time	16 years with School Certificate English or over 21
12.	National Certificate in Retailing: For retail and other staff. Available at most institutes	11 week sandwich course (12 days at institute)	relevant employment
13.	Advanced Certificate in Retailing	15 days during one term	National Certificate or relevant employment

EXAMPLE OF A TRAINING RECORD

APPENDIX 8

Confidential

NAME: **Ann Johnson**
YEAR OF BIRTH: **23.4.58**
DATE JOINED THE COMPANY: **3.2.80**
PRESENT APPOINTMENT: **General Clerk**
TRAINING SUMMARY:

ON-THE-JOB INSTRUCTION	OFF-THE-JOB INSTRUCTION	DATES		NO. OF DAYS/ HOURS	COMMENTS & INITIALS OF SUPERVISOR/ INSTRUCTOR (AS REQUIRED BY COMPANY)
		START	FINISH		
	Induction Course	9.9.30	11.9.80	3 days	
Systematic Instruction		7.10.80	18.10.80	10 days	
	Telephone Technique	6.1.80	8.1.80	2 days	
	Duplicating (External course)	24.3.80	26.3.80	3 days	
Duplicating and Reproduction		31.3.80	22.4.80	15 days	
Wages		4.8.69	4.8.69	6 hours	

INDUSTRY TRAINING BOARDS AND INDUSTRY TRAINING COMMITTEES

APPENDIX 9

Agricultural Training Council, Wellington: Box 3109, Phone 725-926

Apparel Industry Training Board, Wellington: Box 9130, Phone 843-688
Auckland: Box 18-001, Glen Innes, Phone 589-545
Christchurch: Box 2642, Phone 797-774

Aviation and Travel Industry Training Board, Wellington: Box 5086, Phone 729-844

Building Industry Training Board, Wellington: Box 11-755, Phone 721-167
Auckland: Box 271, Phone 30-976

Contracting Industry Training Council, Wellington: Box 12-013, Phone 736-514
Christchurch: Box 22-307, Phone 60-134

Dairy Industry Training Council, Wellington: Box 417, Phone 724-399

Distribution Industry Training Board, Wellington: Box 12-086, Phone 723-733
Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330

Electrical and Electronics Industry Training Board, Auckland: Box 39-354, Phone 398-120
Wellington: Box 9223, Phone 848-054

Employers Association Training Board, Wellington: Box 1786, Phone 722-453

Engineering Industry Training Board, Wellington: Box 12-139, Phone 737-605
Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330
Christchurch: Box 13-083, Phone 795-616
Hamilton: PO Box 371, Phone 394-420

Fishing Industry Training Council, Wellington: Private Bag, Manners Street Post Office, Phone 724-008

Footwear Industry Training Board, Wellington: Box 9130, Phone 843-688
Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330

Furniture Industry Training Board, Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330

Hotel and Catering Industry Training Board, Wellington: Box 503, Phone 844-241
Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330
Christchurch: Box 2642, Phone 797-774

Journalism Training Board, Auckland: Box 17, Pukekohe, Phone 797-626 (Auckland Star)

Local Government Training Board, Wellington: Box 5034, Phone 726-621

Logging and Forestry Industry Training Board, Rotorua: Box 1632, Phone Rot. 75062

Meat Industry Training Board, Wellington: Box 1828, Phone 725-453

Motor Trade Certification Board, Wellington: Box 9244, Phone 858-859

Plumbing, Gas and Drainlaying Industry Training Board, Wellington: Box 6032, Phone 844-184
Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330

Pulp and Paper Industry Training Board, Wellington:
C/- Vocational Training Council, Box 11-361, Phone 858-804 (Refer Rex Foster)

Road Transport Industry Training Board, Wellington: Box 1778, Phone 723-877

Shipping Industry Training Board, Wellington: Box 6634, Te Aro, Phone 851-334

Stock and Station Agents Industry Training Board, Wellington: Box 10-228, Phone 726-233

Tanning Industry Training Board, Palmerston North: Private Bag, Phone 82-108

Textile Industry Training Board, Auckland: 3rd Floor, Durham House, Durham Lane, Phone 797-330
Christchurch: Private Bag, Phone 228-009

Trade Union Training Board, Wellington: Box 6645, Phone 851-334

Waterfront Training Organisation, Auckland: Box 1602, Phone 771-957

INDUSTRY TRAINING BOARDS AND INDUSTRY TRAINING COMMITTEES (CONT.)

APPENDIX 9

INDUSTRY TRAINING COMMITTEES

Fire Services Commission Training Advisory Committee
PO Box 7237, Phone 837-699, Wellington

Funeral Service Training Committee
C/- Mr P. Strong, Gee and Hickton Ltd, PO Box 30-127, Phone 663-103, Lower Hutt

Pharmacy Training Committee
Box 9249, Phone 859-604, Wellington

SMALL BUSINESS AGENCY

Auckland: Box 8862, Phone 32-581

Hamilton: Box 9368, Phone 392-075

Tauranga: Box 785, Phone 83-802

Palmerston North: Box 1521, Phone 69-272

Wellington: Box 4019, Phone 723-141

Christchurch: Box 1566, Phone 797-570

Dunedin: Box 149, Phone 741-830

VTC ADVISORY COMMITTEES

Women's Advisory Committee

Polynesian Advisory Committee

Management Advisory Committee

Micro Electronic Technology Advisory Committee

Clerical and Commercial Working Party

Institutional Training Advisory Committee

Apprenticeship Training Advisory Committee

(All based at VTC Head Office, P.O. Box 11-361, Wellington, Phone 858-804